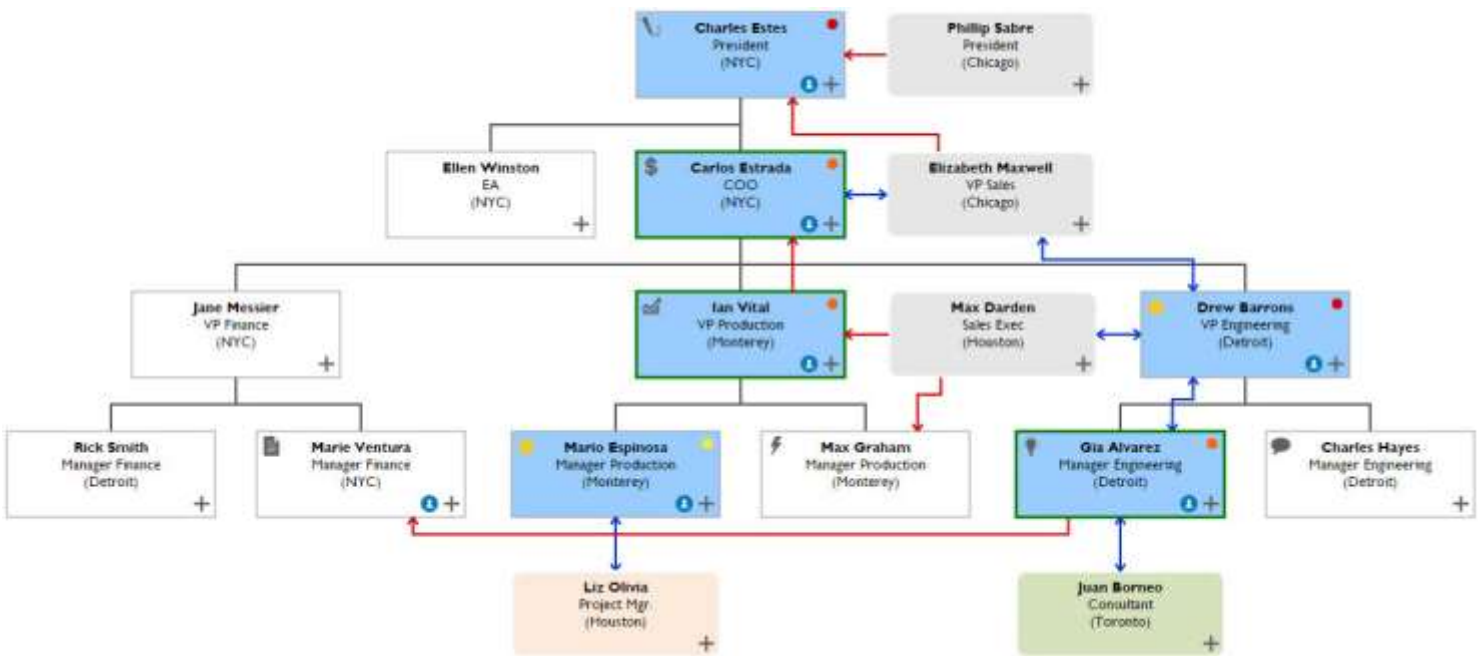


PLAYER MAP X-RAY



Salesforce® Installation Instructions

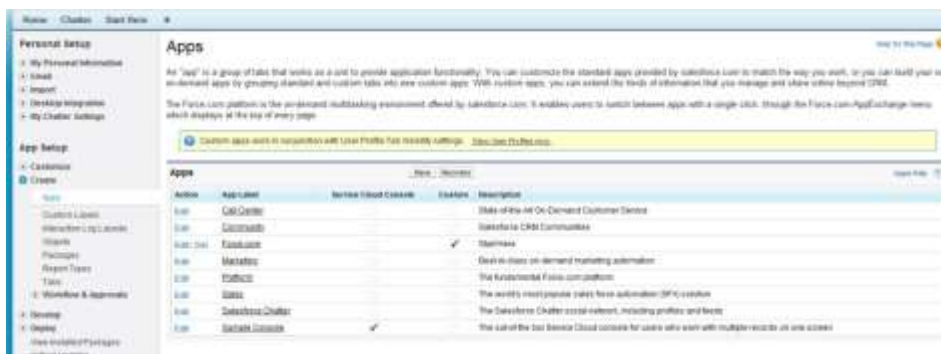
- In Excel, enter [Salesforce Org ID](#) so we can configure PMX and e-mails of PMX users (we register people in PMX by **e-mail** not Salesforce® User Name, so their *exact* e-mail).
 - Trial: use **production** e-mails if want to *pull* Contacts on PMX or use **unique** e-mail.
 - Lightning: click **Player Maps** tab, send PMX home page **URL** screenshot per Page 3.
- Save these steps to PDF, then click [PMX Installation Package](#) to connect to Salesforce® login (note if you are first installing in a sandbox, log into sandbox, then follow the installation steps).
 - ✓ PMX is designed for *standard* Salesforce®, so if Contacts **Reports To** has been customized, some PMX features may not work unless Salesforce® is *reconfigured* to permit PMX access.
- Approve Package API Access page will appear – no need to change anything, click **Next**.
- Package Installation Details page like below will be displayed. Click the **Continue** button.



- Approve Package API Access page appears – no need to change anything, click **Next**.
- Choose Security Level page appears – you can set up as you wish for your PMX users.
 - ✓ Set up [permissions](#) so your PMX users will have access to the **Player Maps** tab.
- Install Package page appears, click **Install**, and click **View Package Contents** to confirm.
- Click **Setup** under your name, under App Setup click **Create**, click **Apps**, click **Edit** by Sales.

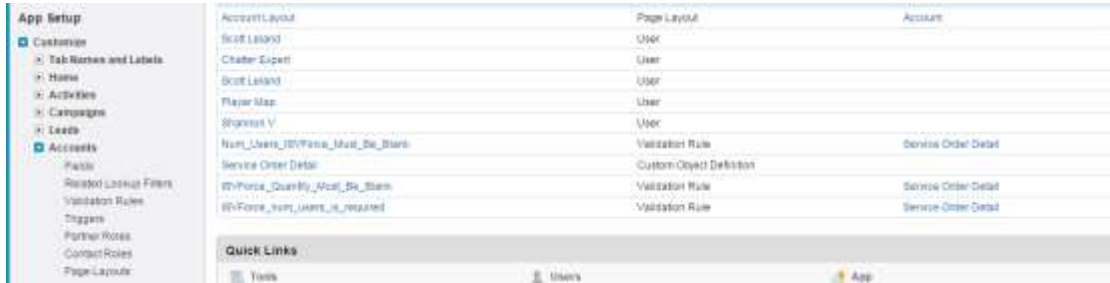


- App Edit page like below appears, click **Player Maps** under Available Tabs, click **Add**, click **Save**.

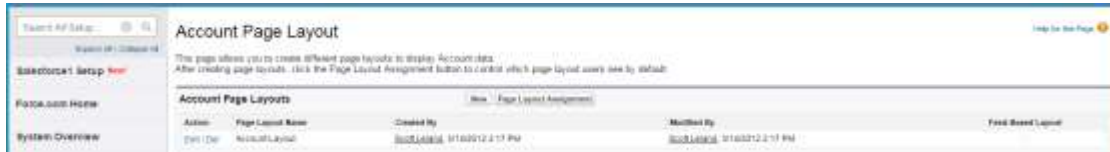


- Player Maps** will appear as a tab in your Salesforce® – if you do not see tab, see setup steps below.

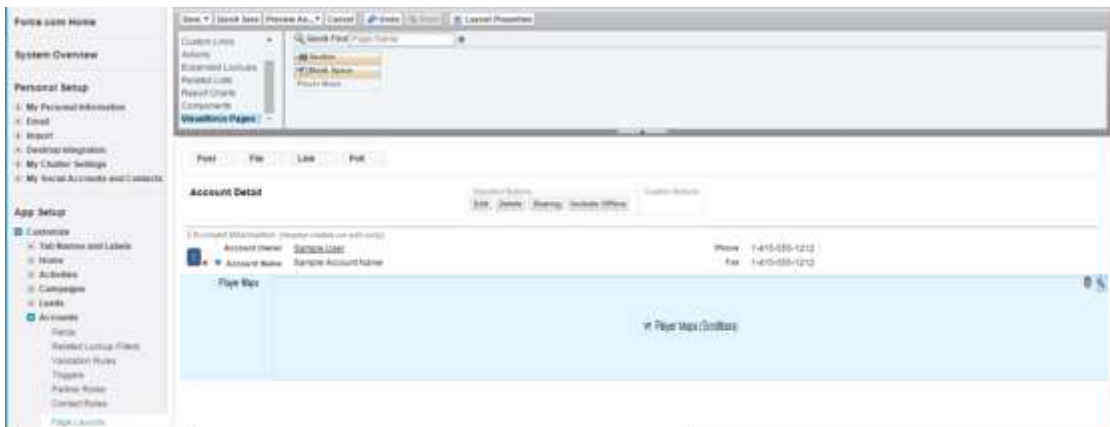
11. Under your name click **Setup**, under App Setup click **Customize, Accounts, Page Layouts**.
 ✓ Please note that you need to execute the *same* steps to set up the **Opportunity** page



12. Account Page Layout page appears, click **Edit**.



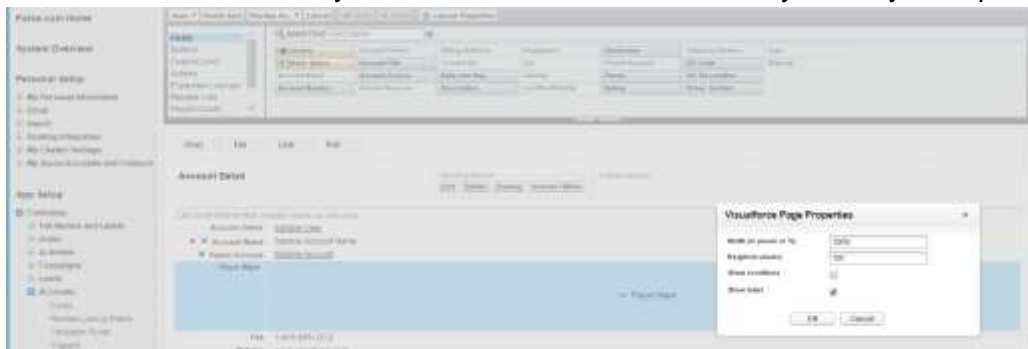
13. Account Layout page appears, click **Visualforce Pages**, drag & drop **Player Maps** box



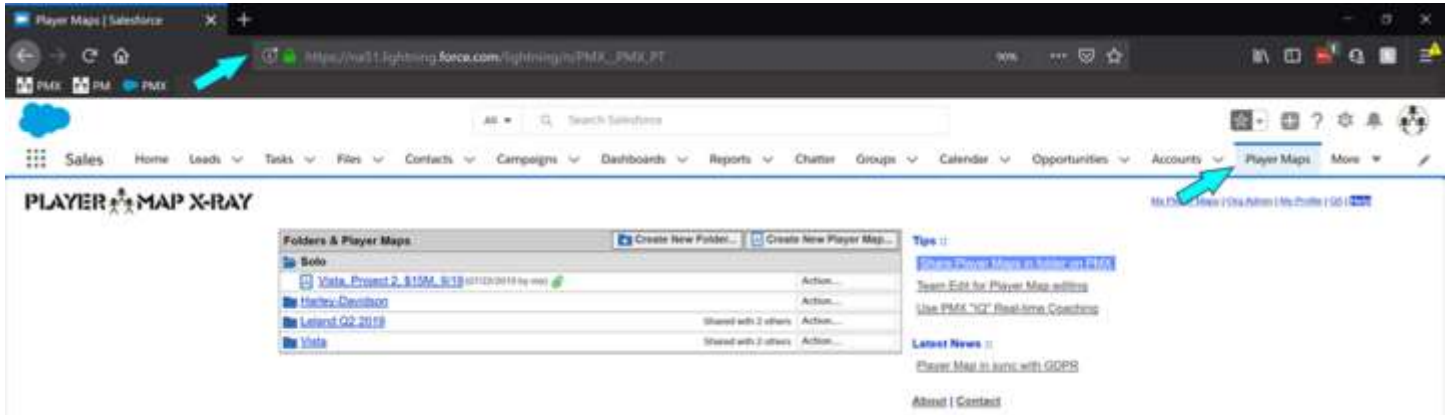
Set columns (we like 1) and scroll bar for Player Maps field Properties (i.e. **Wrench**).



14. Mouse over **Player Maps** box to highlight **Wrench**, click **Wrench** to open menu, then Set **Height** to 100 (you can adjust to your layout), click **Show Label**, and click **OK** – click **Save** in Account Layout box and Salesforce® will save your Player Maps layout.



✓ **Lightning PMX Configuration:** click the **Player Maps** tab, send screenshot of **URL** on PMX home page like below:



✓ **Player Maps Field:** below is Player Maps *custom* field on **Accounts** page (set up the *same* for Opportunities page):



✓ Player Maps Tab: [Steps to set up in Classic](#) or [Steps to set up in Lightning](#)